

Montana ExpoPark
February 2, 2011

Market Assessment and Facility Options

Objectives of Market Assessment

- Identify current and future needs of MEP
- Assess potential for year-round events at ExpoPark
- Identify facility options for ExpoPark
- Prepare range of costs for facility options

Major Work Tasks

- Background and Input
- Site and Facility Assessment
- Economic and Demographic Trends
- Competitive Factors
- Primary Research

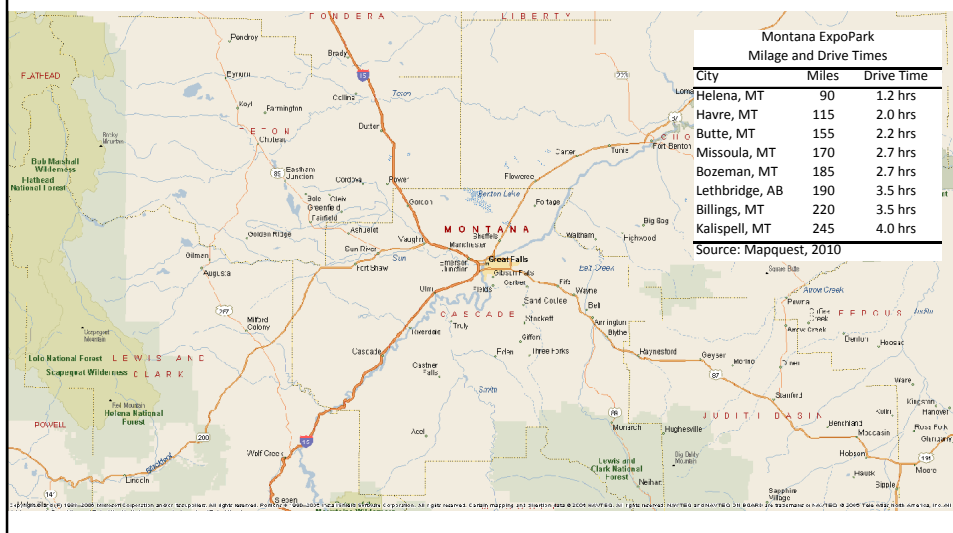
Site Factors

Montana ExpoPark Study

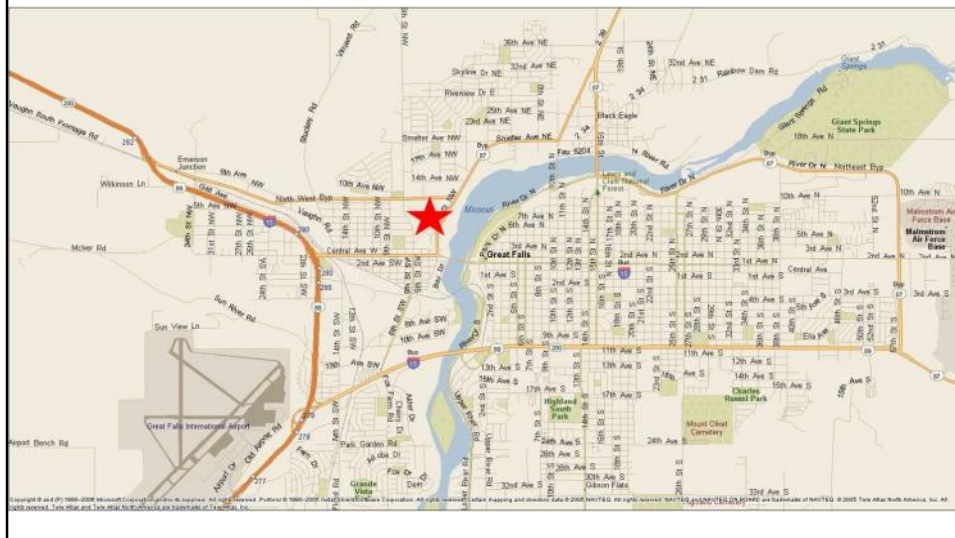
Great Falls Location



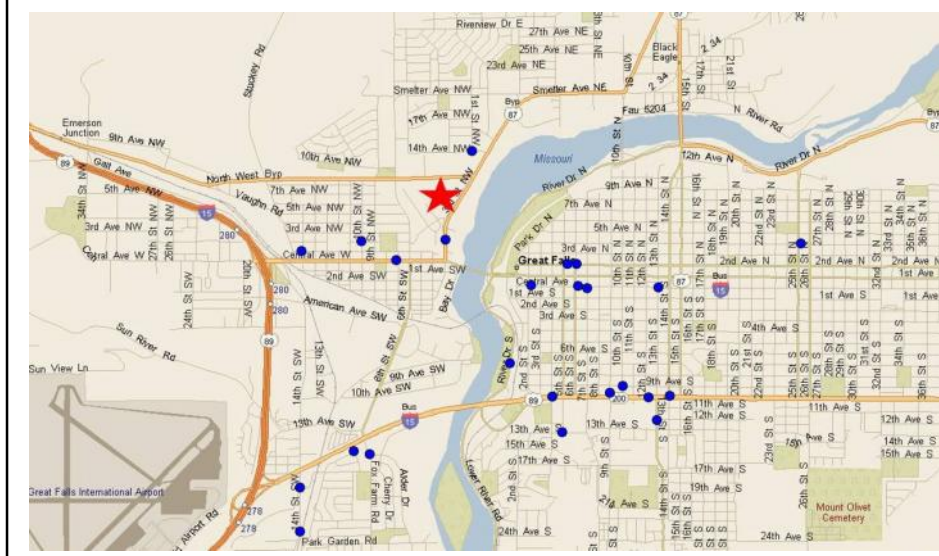
Region Access to Great Falls



ExpoPark in Relation to Great Falls



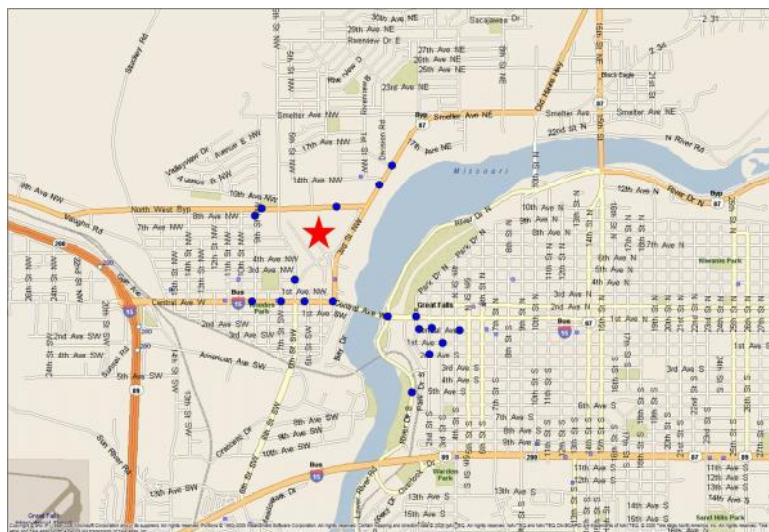
ExpoPark in Relation to Hotels



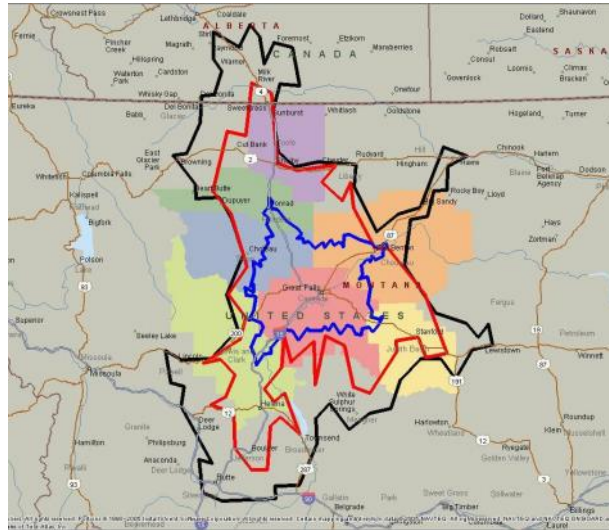
Hotels/Motels in Great Falls

Montana Expopark Hotels/Motels in Great Falls		Montana Expopark Hotels/Motels in Great Falls	
Property name	Number of Rooms	Property name	Number of Rooms
Best Resting Motel	34	Holiday Inn Express	95
Best Western Heritage Inn	233	Imperial Inn	30
Central Motel	30	La Quinta Inn and Suites	92
Comfort Inn	64	Malmstrom Inns	83
Crestview Inn	37	Midtown Motel	40
Crystal Inn	86	Motel 6	59
Days Inn	61	O'Haire Motor Inn	72
Extended Stay America	104	Staybridge Suites	113
Fairfield Inn	63	Super 8 Lodge	112
Great Falls Inn	60	The Quality Inn	104
Hampton Inn	97	Townhouse Inns	109
Hilton Garden Inn	118	Triple Crown Motor Inn	50
Holiday Inn	168	Total	1,155

Proximity to Restaurants



Drive Times to Great Falls



Community Resources

- Five 18-hole golf courses
- Centene Stadium
- Electric City Speedway
- River's Edge Trail
- Electric City Park and other pools

Community Resources

- Community Recreation Center
- Montana State University
- University of Great Falls
- Malmstrom Air Force Base

Cultural Attractions

- Russell Museum
- Lewis & Clark Interpretive Center
- Cascade County Historical Museum
- Malmstrom Air Force Base Museum
- Children's Museum
- Great Falls Symphony
- Mansfield Center for the Performing Arts

Site Location Summary

- Great Falls is central to major population centers in MT
- ExpoPark is highly visible
- ExpoPark is easily accessed
- Very good proximity to support services

Facility Overview

Montana ExpoPark study

Aerial View of Montana ExpoPark



Key Facility Characteristics

- Common limitations
 - Lack of adequate restrooms
 - Lack of energy efficient construction
 - ADA and life/safety code compliance needs

Four Seasons Arena



Exhibition Hall



Key Facility Characteristics

- Four Seasons Arena/Exhibition Hall
 - Appears deficient in # of toilet fixtures and ADA code
 - Generally good condition
 - Limitations in general design, ceiling height, acoustics, seating and rigging capacity
 - Minor roof leaks in Four Seasons
 - Exhibition Hall OHDs and ceiling height minimally adequate





Key Facility Characteristics

- Trades & Industry/Atrium/Fine Arts
 - T&I swamp coolers are marginally adequate
 - Restrooms are limited in T&I
 - Atrium is adequate for smaller meetings
 - Fine Arts, with metal rail, is functionally obsolete



Key Facility Characteristics

- Family Living Center
 - Heated, vented but no A/C
 - High use for banquets, receptions, reunions, etc.
- Paddock Club
 - Divided space, heat and A/C
 - General quality and aesthetics are marginal



Key Facility Characteristics

- Grandstand
 - Seating for 2,420; used for rodeos, motor/dirt events, horse racing
 - Appears to lack many basic life/safety provisions
 - Lack adequate restrooms, designated accessible seating
 - Crumbling concrete, splintering bleachers, poor lighting, ventilation and overall appearance





Key Facility Characteristics

- Livestock Pavilion
 - Used for horse events, public riding and consumer shows
 - Marginal lighting and ventilation
 - Metal siding has some rust and rot



Key Facility Characteristics

- Back Side
 - Nine race barns, test barn and race office, some RV areas
 - Stalls are unacceptable for horse events
 - Poor ventilation, limited water, poor lighting, unlevel stall flooring and damage to interior walls of stalls

Usage Trends

Montana ExpoPark study

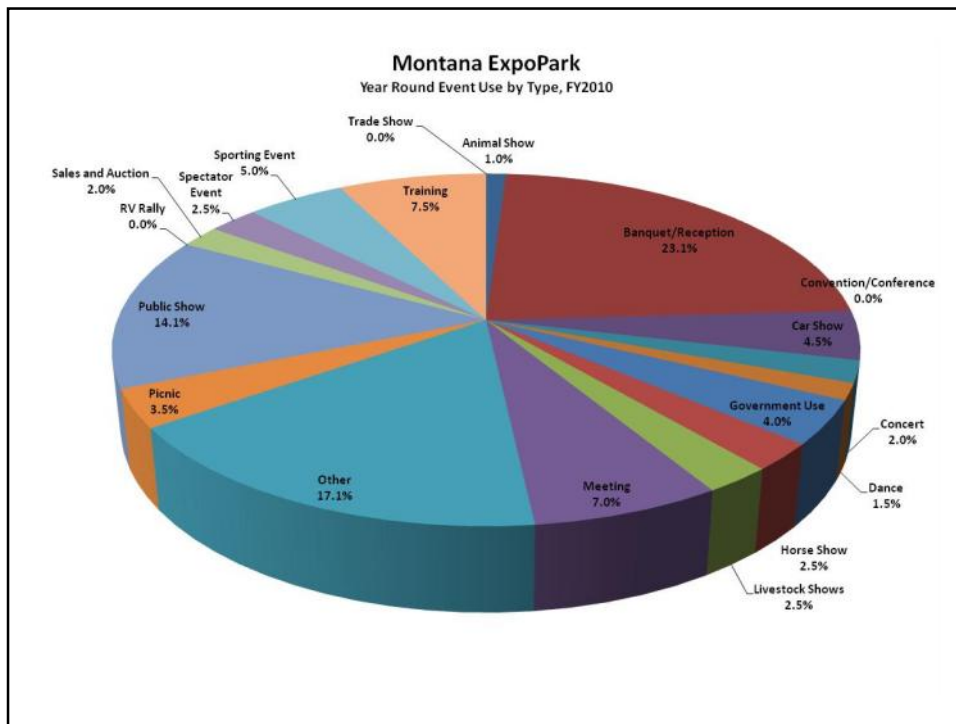
Usage by Event Type

Montana ExpoPark Number of Events by Type, FY 2008-2010			
Event Type	2008	2009	2010
Animal Show	4	1	2
Banquet/Reception	52	48	46
Convention/Conference	0	3	0
Car Show	7	5	9
Concert	8	5	4
Dance	5	3	3
Government Use	11	4	8
Horse Show	6	5	5
Livestock Shows	6	6	5
Meeting	14	14	14
Other	35	29	34
Picnic	12	15	7
Public Show	20	25	28
RV Rally	1	0	0
Sales and Auction	3	5	4
Spectator Event	6	8	5
Sporting Event	19	5	10
Training	8	14	15
Trade Show	4	2	0
Total	221	197	199

Source: Montana Expo Park

Montana ExpoPark Number of Event Days by Type, FY 2008-2010			
Event Type	2008	2009	2010
Animal Show	7	2	5
Banquet/Reception	54	58	51
Convention/Conference	0	12	0
Car Show	9	7	13
Concert	9	5	4
Dance	7	3	5
Government Use	19	5	14
Horse Show	19	12	11
Livestock Shows	8	7	6
Meeting	33	17	15
Other	94	88	81
Picnic	12	15	7
Public Show	52	57	63
RV Rally	4	0	0
Sales and Auction	34	43	30
Spectator Event	10	22	18
Sporting Event	68	52	58
Training	17	19	26
Trade Show	5	4	0
Total	461	428	407

Source: Montana Expo Park



Usage by Month

Montana ExpoPark
Event Usage, FY 2008 - 2010

Month	2008		2009		2010	
	Number of Events	Number of Event Days	Number of Events	Number of Event Days	Number of Events	Number of Event Days
July	3.6%	6.1%	4.1%	3.0%	5.0%	2.7%
August	7.2%	6.1%	9.6%	8.9%	6.5%	7.1%
September	14.0%	11.7%	13.7%	9.8%	18.6%	14.7%
October	6.8%	8.7%	11.7%	7.9%	11.1%	11.3%
November	4.1%	10.4%	5.1%	4.4%	8.0%	5.4%
December	9.0%	5.0%	8.6%	13.3%	7.5%	9.8%
January	7.2%	8.0%	6.6%	8.2%	5.5%	6.4%
February	5.9%	11.5%	4.6%	11.0%	4.5%	11.1%
March	7.7%	8.2%	6.6%	6.8%	7.5%	10.6%
April	10.9%	7.6%	9.1%	7.9%	7.0%	7.4%
May	14.0%	10.0%	9.6%	5.6%	11.6%	8.1%
June	9.5%	6.7%	10.7%	13.1%	7.0%	5.4%
Total	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: Montana ExpoPark

Events by Building/Space

Montana ExpoPark Number of Events by Building/Area Used				Montana ExpoPark Percentage of Events by Building/Area Used			
	2008	2009	2010		2008	2009	2010
Four Seasons Arena	35	27	26	Four Seasons Arena	15.0%	12.9%	12.4%
Exhibition Hall	31	24	28	Exhibition Hall	13.3%	11.5%	13.3%
Livestock Pavilion	15	14	13	Livestock Pavilion	6.4%	6.7%	6.2%
Trades & Industries	29	22	28	Trades & Industries	12.4%	10.5%	13.3%
Family Living Center	43	45	40	Family Living Center	18.5%	21.5%	19.0%
Lottery Club	21	12	8	Lottery Club	9.0%	5.7%	3.8%
Atrium	5	5	4	Atrium	2.1%	2.4%	1.9%
Paddock Club	9	16	20	Paddock Club	3.9%	7.7%	9.5%
Fine Arts	4	7	8	Fine Arts	1.7%	3.3%	3.8%
Beef Barn	3	1	0	Beef Barn	1.3%	0.5%	0.0%
Central Park	15	15	13	Central Park	6.4%	7.2%	6.2%
Parking Lot	8	6	9	Parking Lot	3.4%	2.9%	4.3%
Merchandise Building	7	7	7	Merchandise Building	3.0%	3.3%	3.3%
Heritage Building	5	4	1	Heritage Building	2.1%	1.9%	0.5%
Grandstand	1	1	0	Grandstand	0.4%	0.5%	0.0%
Poultry Barn	2	2	2	Poultry Barn	0.9%	1.0%	1.0%
FFA Building	0	1	3	FFA Building	0.0%	0.5%	1.4%
	233	209	210		100.0%	100.0%	100.0%

Use Days by Building

Montana ExpoPark Number of Use Days by Building/Area Used				Montana ExpoPark Percentage of Use Days by Building/Area Used			
	2008	2009	2010		2008	2009	2010
Four Seasons Arena	61	64	64	Four Seasons Arena	12.4%	13.5%	13.2%
Exhibition Hall	55	60	53	Exhibition Hall	11.2%	12.6%	11.0%
Livestock Pavilion	35	28	26	Livestock Pavilion	7.1%	5.9%	5.4%
Trades & Industries	87	74	83	Trades & Industries	17.6%	15.6%	17.1%
Family Living Center	70	69	62	Family Living Center	14.2%	14.5%	12.8%
Lottery Club	29	15	8	Lottery Club	5.9%	3.2%	1.7%
Atrium	8	18	11	Atrium	1.6%	3.8%	2.3%
Paddock Club	11	20	29	Paddock Club	2.2%	4.2%	6.0%
Fine Arts	6	18	56	Fine Arts	1.2%	3.8%	11.6%
Beef Barn	46	31	0	Beef Barn	9.3%	6.5%	0.0%
Central Park	19	17	14	Central Park	3.9%	3.6%	2.9%
Parking Lot	16	6	11	Parking Lot	3.2%	1.3%	2.3%
Merchandise Building	30	13	14	Merchandise Building	6.1%	2.7%	2.9%
Heritage Building	16	38	5	Heritage Building	3.2%	8.0%	1.0%
Grandstand	1	1	0	Grandstand	0.2%	0.2%	0.0%
Poultry Barn	3	2	2	Poultry Barn	0.6%	0.4%	0.4%
FFA Building	0	1	46	FFA Building	0.0%	0.2%	9.5%
	493	475	484		100.0%	100.0%	100.0%

Pari-Mutuel Trend Analysis

Montana Pari-Mutuel Racing Statistics
Live Race Meet Handle

	2008	2009	2010
Billings	\$601,300	\$655,600	\$609,500
Great Falls	367,900	272,500	342,000
Kalispell	0	0	101,400
Miles City	93,400	101,100	114,700
Missoula	0	0	244,000
	<u>\$1,062,600</u>	<u>\$1,029,200</u>	<u>\$1,411,600</u>

Montana Pari-Mutuel Racing Statistics
Number of Live Race Days

	2008	2009	2010
Billings	8	8	8
Great Falls	7	5	6
Kalispell	0	0	2
Miles City	3	3	4
Missoula	0	0	2
	<u>18</u>	<u>16</u>	<u>22</u>

Pari-Mutuel Trend Analysis

Montana Pari-Mutuel Racing Statistics
Average Handle Per Race Day

	2008	2009	2010
Billings	\$75,200	\$82,000	\$76,200
Great Falls	52,600	54,500	57,000
Kalispell	0	0	50,700
Miles City	31,100	33,700	28,700
Missoula	0	0	122,000
	<u>\$158,900</u>	<u>\$170,200</u>	<u>\$334,600</u>

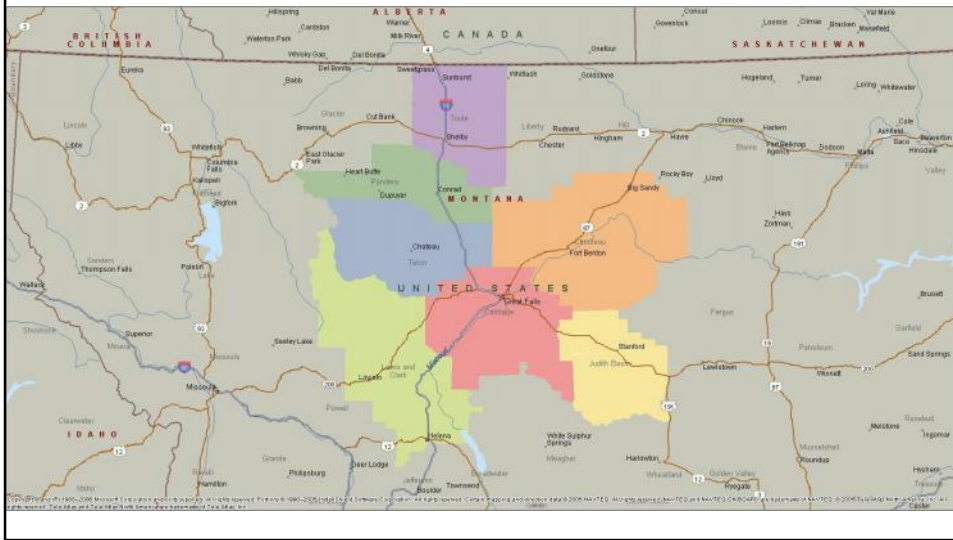
Use Trend Summary

- The entire facilities are highly used with a varied mix of events and activities
- Conventions, RV rallies and private trade shows are almost non-existent
- Significant portion of grounds used for a money losing activity – horse racing/training

Demographic/Economic Trends

Montana ExpoPark Study

Primary and Secondary Markets

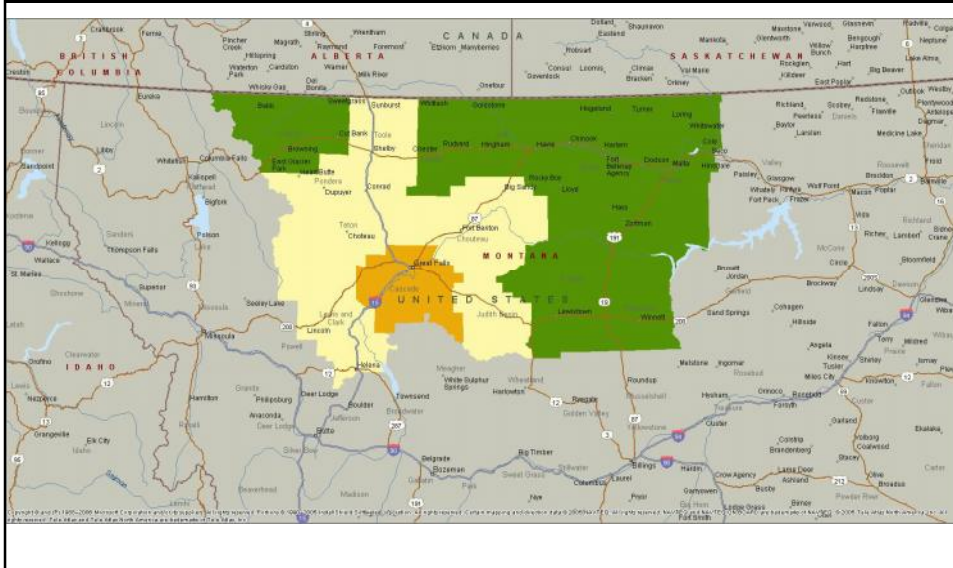


Population Trends

Montana ExpoPark Historical and Projected Population, 1990 to 2030						
Market Area	1990	2000	2007	2010	2020	2030
Primary Market						
Cascade County	77,690	80,357	81,775	80,640	76,660	76,720
Secondary Market						
Chouteau County	5,453	5,970	5,254	5,110	4,770	4,620
Judith Basin County	2,282	2,329	2,048	1,980	1,910	1,890
Lewis & Clark County	47,494	55,716	59,998	63,050	72,540	82,020
Pondera County	6,433	6,424	5,943	5,810	5,440	5,280
Teton County	6,271	6,445	6,023	5,920	5,720	5,640
Toole County	<u>5,046</u>	<u>5,267</u>	<u>5,144</u>	<u>5,030</u>	<u>4,740</u>	<u>4,640</u>
Total Secondary Market	<u>72,979</u>	<u>82,151</u>	<u>84,410</u>	<u>86,900</u>	<u>95,120</u>	<u>104,090</u>
Total Market Area	<u>150,669</u>	<u>162,508</u>	<u>166,185</u>	<u>167,540</u>	<u>171,780</u>	<u>180,810</u>
State of Montana	<u>799,065</u>	<u>902,195</u>	<u>957,861</u>	<u>985,930</u>	<u>1,078,460</u>	<u>1,182,440</u>

Source: U.S. Census Bureau, State of Montana

Larger Retail Trade Market

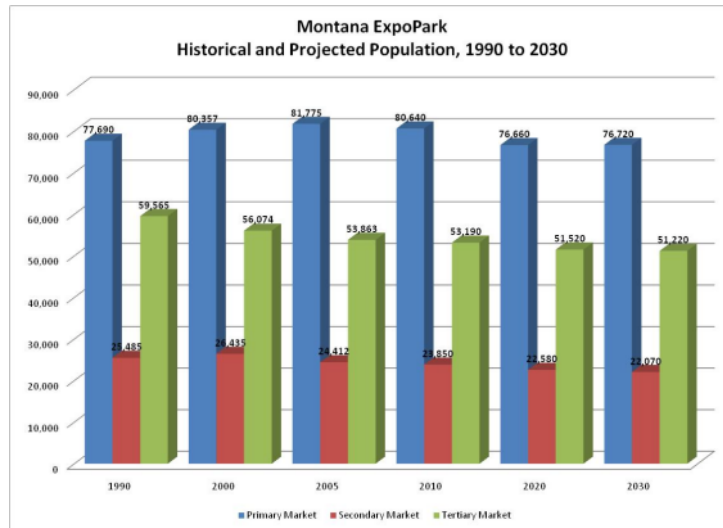


Larger Market Population Trends

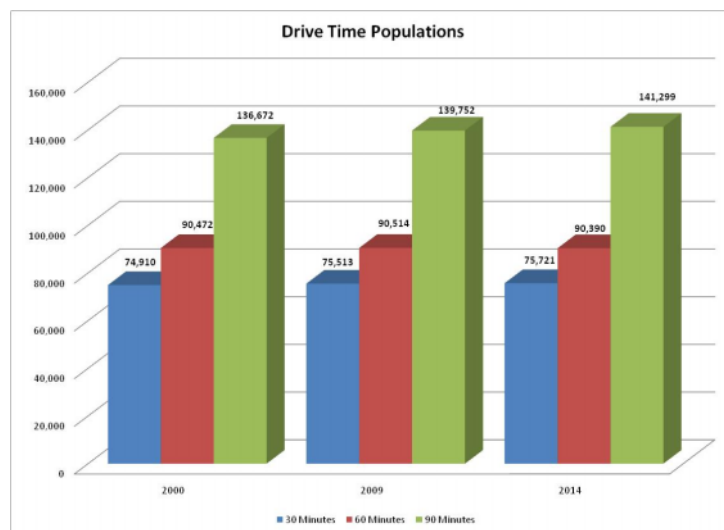
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Primary Market						
Cascade County	77,690	80,357	81,775	80,640	76,660	76,720
Secondary Market						
Chouteau County	5,453	5,970	5,254	5,110	4,770	4,620
Judith Basin County	2,282	2,329	2,048	1,980	1,910	1,890
Pondera County	6,433	6,424	5,943	5,810	5,440	5,280
Teton County	6,271	6,445	6,023	5,920	5,720	5,640
Toole County	5,046	5,267	5,144	5,030	4,740	4,640
Total Secondary Market	<u>25,485</u>	<u>26,435</u>	<u>24,412</u>	<u>23,850</u>	<u>22,580</u>	<u>22,070</u>
Tertiary Market						
Blain County	9,728	7,009	6,550	6,430	6,180	6,130
Fergus County	12,083	11,893	11,181	11,060	10,810	10,910
Glacier County	12,122	13,247	13,382	13,450	13,560	13,710
Hill County	17,655	16,673	16,568	16,260	15,480	15,200
Liberty County	2,295	2,158	1,796	1,760	1,630	1,550
Petroleum County	519	493	438	400	370	370
Phillips County	<u>5,163</u>	<u>4,601</u>	<u>3,948</u>	<u>3,830</u>	<u>3,490</u>	<u>3,350</u>
Total Tertiary Market	<u>59,565</u>	<u>56,074</u>	<u>53,863</u>	<u>53,190</u>	<u>51,520</u>	<u>51,220</u>
Total Market Area	<u>162,740</u>	<u>162,866</u>	<u>160,050</u>	<u>157,680</u>	<u>150,760</u>	<u>150,010</u>
State of Montana	<u>799,065</u>	<u>902,195</u>	<u>957,861</u>	<u>985,930</u>	<u>1,078,460</u>	<u>1,182,440</u>

Source: U.S. Census Bureau, State of Montana

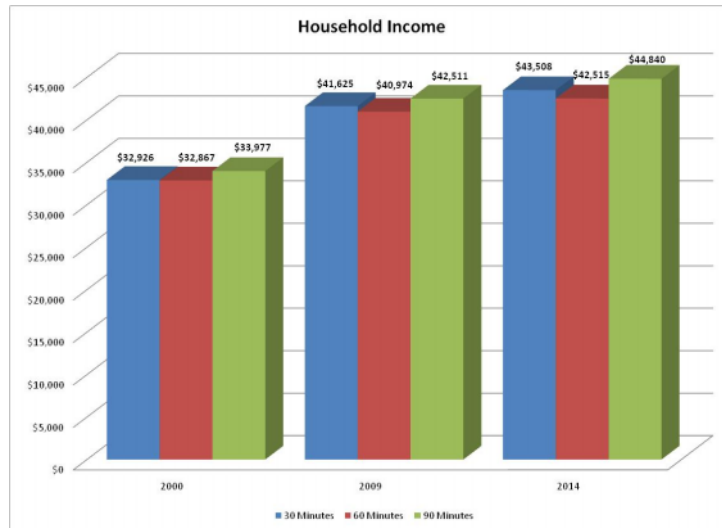
Larger Market Population Trends



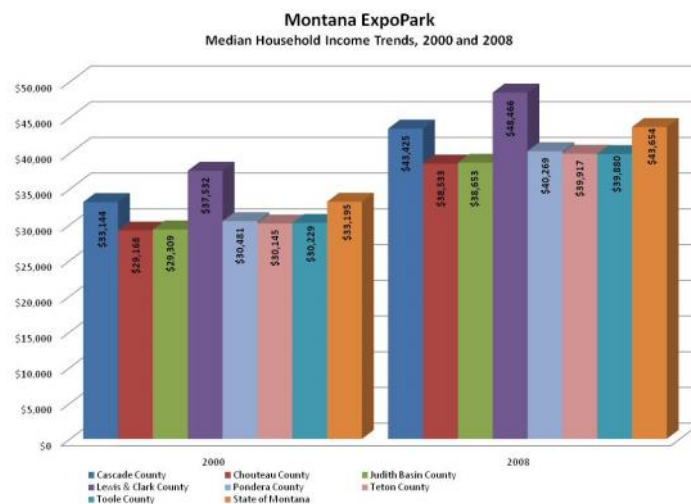
Drive Time Populations

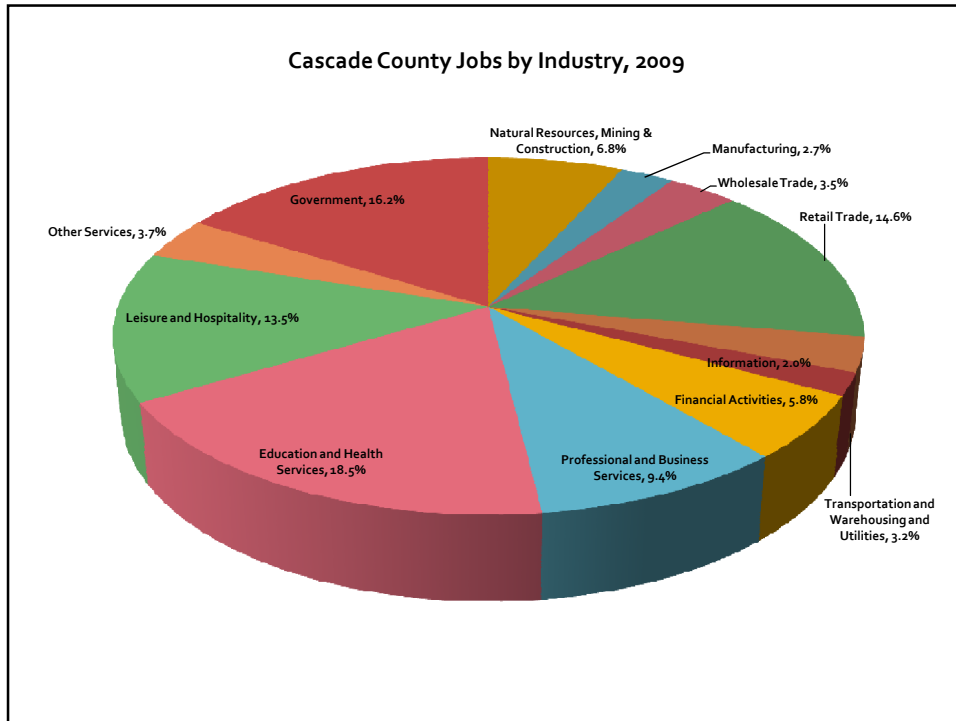


Household Incomes

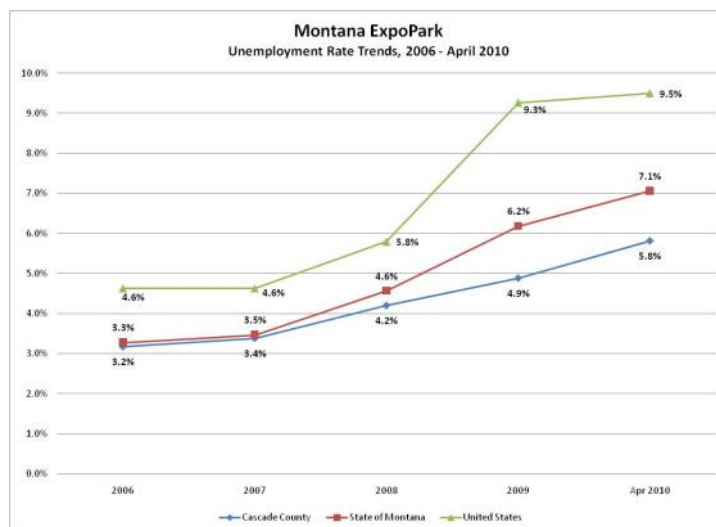


Median Household Incomes





Unemployment Rate Trends



Demographic/Economic Summary

- Flat to declining population in ExpoPark's market area will limit demand for events and activities of area residents
- Aging population will limit types of events and activities demanded by area residents
- ExpoPark must position itself more and more as a destination event facility

Competitive Factors

Montana ExpoPark Study

Principal Competitive Facilities

- Local event Facilities
- Regional Arenas
- Regional Horse Show Facilities

Source: TXDOT

Local Event Facilities

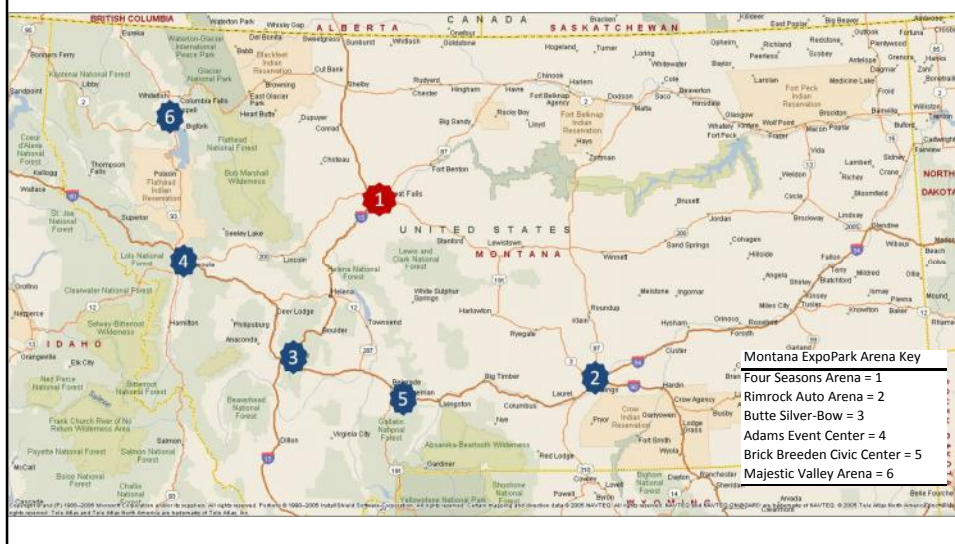
Facility	Square Ft	Dimensions	Booths	Climate Controlled	Daily Rate	Rate Per Square Foot	Concession Areas	Kitchen Type
<u>Montana ExpoPark</u>								
Exhibition Hall	15,000	150 x 100	90	Yes	\$950	\$0.063	Yes	None
Four Seasons Arena	53,000	222 x 141	300	Yes	\$3,000	\$0.057	Yes	None
Heritage Building	14,700	150 x 98	N/A	No	\$350	\$0.024	No	None
Trades and Industries	16,000	200 x 80	95	Yes	\$675	\$0.042	No	None
Paddock Club Side 1	2,926	77 x 38	N/A	Yes	\$200	\$0.068	Yes	None
Paddock Club Side 2	1,739	47 x 37	N/A	Yes	\$275	\$0.158	Yes	None
<u>Mansfield Convention Center</u>								
Mansfield Convention Center	15,300	153 x 100	92	Yes	\$1,275 - \$1,820	\$0.083 to \$0.119	No	Catering
<u>Best Western Heritage Inn</u>								
Convention Room	12,000	N/A	70	Yes	\$1,000	\$0.083	No	On Property
International Room	3,500	N/A	N/A	Yes	\$450	\$0.129	No	On Property

Local RV Parks in Great Falls Area

Map Key	RV Park Name	Location	Ownership	RV Spaces	Hook-Ups	Amps	Rates	Cable TV	Dump Station	Internet	Laundry	Playground	Pool	Rest Rooms	Showers
1	Dicks RV Park	Great Falls, MT	Private	150	F/WE/E	50	\$32	X	X	X	X			X	X
2	Great Falls KOA	Great Falls, MT	Private	178	F/WE/E	50	\$67	X	X	X	X	X	X	X	X

Hook-Ups F = Full, WE = Water and Electric, E = Electric

Montana Arenas



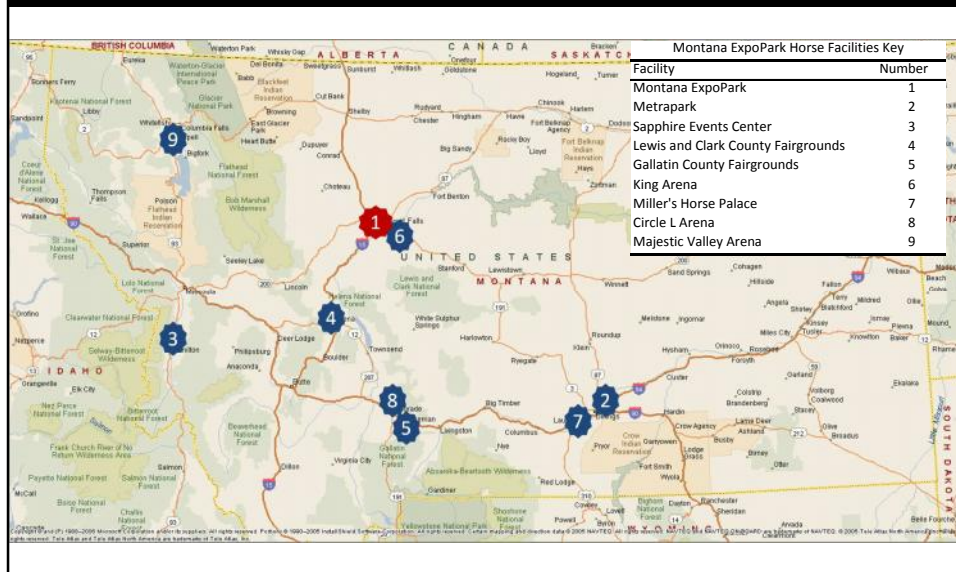
Competitive Arenas

Montana ExpoPark Comparison of Arena Facilities in Regional Market Area						
	4 Seasons Arena	Rimrock Auto Arena	Butte-Silver Bow Civic Center	Adams Center	Brick Breeden Fieldhouse	Majestic Valley Arena
Location	Great Falls, MT	Billings, MT	Butte, MT	Missoula, MT	Bozeman, MT	Kalispell, MT
Arena Floor Size	141 x 222	85 x 200	19,623 Sq. Ft.	97 x 148	162 x 300	130 x 300
Permanent Seats	5,434	8,700	3,500	7,500	5,000	4,500
Concert Seats	6,164	10,782	7,000	5,500-7,500	8,617	7,000
Basketball Seats	5,434	10,500	6,250	7,500	7,250	N/A
Base Pricing	\$3,000	\$3,000	\$2,000	\$2,500	\$2,500	\$2,000
Major Tenant	N/A	Billings Outlaws	N/A	Grizzlies	Montana State University Bobcats	N/A
Size of MSA	<u>82,000</u>	<u>154,500</u>	<u>32,949</u>	<u>108,623</u>	<u>90,343</u>	<u>83,624</u>
Number of Seats per person in MSA	<u>15.1</u>	<u>17.8</u>	<u>9.4</u>	<u>14.5</u>	<u>18.1</u>	<u>18.6</u>

Comparable Arena Markets

Montana ExpoPark Comparison of Arenas in Similar Markets				
Metro Statistical Area	2009 Population	Arena/Civic Center	Number of Seats	Major Tenant
Dubuque, IA	93,072	Five Flags Center	4,800	None
Palm Coast, FL	91,622	None	N/A	N/A
Pocatello, ID	90,273	Holt Arena	8,000	Idaho State Bengals (NCAA)
Cheyenne, WY	88,854	Taco John's Event Center	2,100	None
Elmira, NY	88,331	First Arena	3,784	Elmira Jackals (ECHL)
Ames, IA	87,214	James Hilton Coliseum	14,356	Iowa State Cyclones (NCAA)
Corvallis, OR	82,605	Gill Coliseum	10,400	Oregon State Beavers (NCAA)
Great Falls, MT	82,178	Four Seasons Arena	6,164	None
Danville, IL	80,067	David S Palmer Arena	2,350	Eastern Illinois University (NCAA)
Sandusky, OH	76,963	None	N/A	N/A
Columbus, IN	76,063	None	N/A	N/A
Casper, WY	74,508	Casper Events Center	7,500	None
Hinesville-Fort Stewart, GA	74,420	None	N/A	N/A
Lewiston, ID-WA	60,643	None	N/A	N/A
Carson City, NV	55,176	None	N/A	N/A

Horse Show Facilities



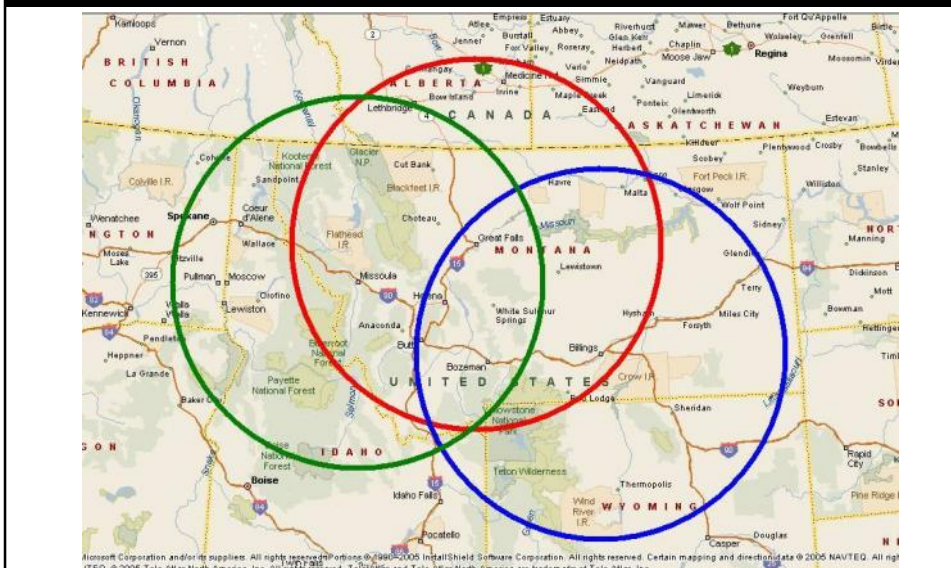
Horse Show Facility Comparison

Facility Description	Majestic Valley Arena Kaliispell, MT	Metrapark Billings, MT	Sapphire Event Center Corvallis, MT	Lewis and Clark County Fairgrounds Helena, MT	Gallatin County Fairgrounds Bozeman, MT	King Arena Great Falls, MT	Miller's Horse Palace Laurel, MT	Circle L Arena Belgrade, MT
Indoor arena	1	1	1	1	1	1	1	1
Daily rate	\$2,000	\$1,000	\$600	\$258 w/o spectators \$464 w/ spectators	\$401 per day \$94 per hour	N/A	\$500	\$450
Indoor ring size	130 x 300	120 x 230	160 x 300	120 x 200	60 x 174	110 x 265	93 x 192	80 x 200
Floor surface	Dirt	Concrete	mostly sand	Dirt	Dirt over concrete	Dirt	Dirt	Dirt
Seating capacity	7,000	up to 12,000	200	1,000	1,200	N/A	200	Minimal
Concession stands	Yes	Yes	hired staff	No	Yes	Yes	Yes	Yes
Heated	Yes	No	No	Yes	Yes	No	Yes	Yes
Air conditioning	None	Yes	None	None	Yes	No	None	No
Covered arena	None	Yes	None	None	None	None	None	None
Seating capacity	N/A	200	N/A	N/A	N/A	N/A	N/A	N/A
Additional arena	None	None	None	None	None	None	None	None
Outdoor arena	1	None	Yes	Yes	1	1	1	1
Daily rate	500	N/A	\$400	\$257+	\$357 w/o lights	N/A	\$250	350
Ring size	150 x 300	N/A	140 x 270	200 x 300	150 x 300	150 x 320	120 x 192	135 x 300
Seating capacity	none	N/A	300+	4,600	1,500	N/A	200	None
Concession stands	Set up only	N/A	hired	Yes	No	N/A	Yes	Yes
Stalls	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Daily rate	\$20	N/A	\$30	\$15	\$15	N/A	N/A	\$25 to \$30
Enclosed stalls	164 indoor-180 outdoor	N/A	63	200+	80	N/A	N/A	24
Portable stalls	190	N/A	N/A	N/A	N/A	N/A	N/A	25
Stall size	12 x 12	N/A	10 x 10	10 x 10	8 x 10	N/A	12 x 12	12 x 12 and 12 x 14
RV facilities	Yes	Yes	Yes	Yes	Yes	None	None	None
How many	50	50	20	21	37+	N/A	N/A	Yes
Cost	\$20	\$20	\$15	\$20	\$24 per night	N/A	N/A	\$10
Type of Hook-ups	W/E	W/E	E	Electricity	Full and Dry	N/A	N/A	

Horse Populations



Comparative Radius



Competitive Facility Summary

- ExpoPark is largest event facility in GF area
- Local event facilities lack space for larger conventions/conferences and banquets
- ExpoPark would be more competitive with local event facilities with upgrades and expansions
- Montana lacks both centralized and large equestrian and convention facilities

Input, Interviews and Surveys

Montana ExpoPark Study

Recap of Primary Research Tasks

- Surveyed and interviewed major users/stakeholders of Montana ExpoPark
- Researched and gathered information about numerous other larger events held at MEP on a recurring basis
- Conducted surveys of local businesses

Recap of Primary Research Tasks

- Conducted surveys of Montana state associations
- Conducted on-line surveys of the general public
- Conducted email surveys of Montana Horse Clubs and Associations

Local Business Surveys

- 14 surveys were returned
- 11 indicated it uses off-site facilities
- 9 of the 11 indicated adequate facilities
- 8 of the 11 respondents (73 percent) indicated they would consider using facilities at the ExpoPark
- Of all the respondents, the types of events listed included banquets, conferences, meetings and trade shows

Association/Convention Surveys

- 17 surveys were completed, of which 14 (82 percent) indicated interest in hosting an event(s) in Great Falls.
- 11 of the 14 respondents are willing to use stand-alone facilities

Association/Convention Surveys Continued

- Type and amount of space needed:
 - Exhibit space - between 4,000 square feet to 20,000 square feet
 - Number of delegates attending range from 40 to 800, with most being in the 300-350 delegate range
 - The average number of meeting/breakout rooms is 3 to 6, with a few needing more than 10

Interested State Associations

Montana ExpoPark
Association Survey Respondents Interested in Great Falls Facilities

Association	Event Type	Month Held
Montana Funeral Directors Association	Convention	June
Montana NonProfit Association	Convention	September
Montana Police Protective Association	Convention	July
Mental Health America of Montana	Conference	May
Montana tavern Association	Convention	September
Montana Seed Growers Association	Training	January
Montana Contractors Association	Convention	January
Montna Telecommunications Association	Conference	August
Montana Grain Growers Association	Covention	December
Montana Hospital Association	Convention	January
Montana School Boards Association	Convention	October

Horse Club Surveyed

- Montana Reining Horse Association
- Montana Barrel Horse Association
- Montana Cutting Horse Association
- Montana Hunter Jumper Association
- Montana Quarter Horse Association

Horse Club Surveyed

- Montana Paint Horse Association
- Montana Appaloosa Horse Club
- Northwest Montana Team Penning Association
- Wrangler Team Roping Championships

General Public Survey Responses

Montana ExpoPark Public Survey Responses for Types of Activities at ExpoPark

Barrel Racing and Practices	Fund Raisers
Basketball, Volleyball, Wrestling	High School Graduations
Christian Church Services	Monster Truck Show
Comedy Shows/Concerts	More Rock Concerts
Conventions and Conferences	Moto Cross
Eliminate Horse Racing	Public Horse Riding
Extend the Horse Racing Season	State FFA, FCCLA Competitions
Farmer's Market	Wedding Receptions
Fewer Country Concerts	

Market Potential

Montana ExpoPark Study

Market Potential

- Additional concerts focusing on a diversity of music genres
- Spectator events, such as family shows, touring productions, motor sports
- Local, state and multi-state/regional horse shows

Market Potential

- Conventions and conferences with over 350 delegates
- State and regional RV rallies
- Self-promoted consumer/public shows

New Event Potential

- **Concerts** – 4 to 6 per year, averaging 3,500 to 4,000 ticket sales per event
- **Spectator events** – 6 to 10 per year, ranging from 1,500 to 2,500 ticket sales per event

New Event Potential

- **Local/area horse events** – 12 to 14 per year, averaging 40 to 50 horses over 1.5 days
- **State horse events** – 4 to 6 per year, averaging 250 to 300 horses over 2.5 event days
- **Multi-state horse events** – 2 to 4 per year, averaging 500 plus horses over 4.5 event days

New Event Potential

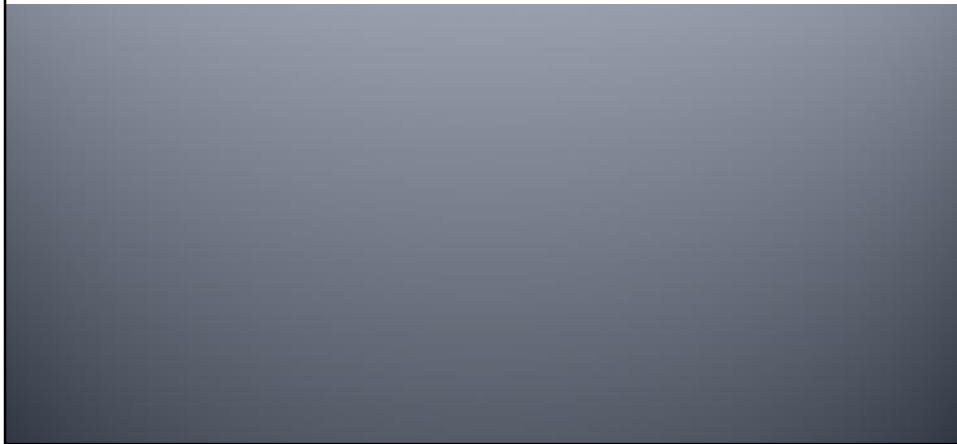
- **Conventions/conferences** – 12 to 18 per year, averaging 350 delegates over 3 days
- **Meetings/training** – 10 to 15 per year with average need for 1,500 to 2,000 square feet of space
- **Banquets/receptions** – 12 to 15 per year averaging 500 to 600 people

New Event Potential

- **State and regional RV rallies** – 2 to 4 per year, averaging 100 rigs per event over 2 days/2 nights
- **Self-promoted consumer/public shows** – 3 to 4 per year, averaging 20,000 to 30,000 square feet of exhibition space

Facility Options

Montana ExpoPark Study



Events and Facility Needs

Event	Estimated New Number per Year	Facility Needs	Economic Impacts
Concerts	4 - 6	Current 4 Season Arena or New Arena	No
Spectator Events	6 - 10	New Arena	No
Local Horse Shows	12 - 14	Current Livestock Pavilion or New Equestrian Center	No
State Horse Shows	4 - 6	New Equestrian Center	Yes
Multi-State Horse Shows	2 - 4	New Equestrian Center	Yes
Conventions/Conferences	12 - 18	Renovated 4-Seasons and Exhibit Hall or New Conference Center	Yes
Meetings/Training	10 - 15	Renovated Exhibit Hall	No
Banquets/Receptions	12 - 15	Renovated Exhibit Hall	No
State & Regional RV Rallies	2 - 4	Current Tree Areas and Expanded Grass Area in Infield	Yes
Self Promoted Public Shows	3 - 4	Renovated 4-Seasons and Exhibit Hall	No
	55 - 81		

Equestrian Facility Options

Option A

- Build a new indoor arena to the northwest of the Livestock Pavilion, with 2,500 to 3,000 bleacher seats, concessions areas restrooms, box office, show office, showers and dirt floor ring (140 x 280)
- Convert the Livestock Pavilion into a multi-use stall barn/livestock building



Equestrian Facility Options

Option A

- Would also need indoor warm-up arena and outdoor arena
- Livestock Pavilion could accommodate only 200 stalls and wash racks
- May be difficult for load/unload
- Would eliminate poultry/rabbit barn

Equestrian Facility Options

Option B

- Redevelop Back Side into a dedicated equestrian center
 - New indoor arena with 2,500 to 3,000 bleacher seats, concessions areas restrooms, box office, show office, showers and dirt floor ring (140 x 280)
 - Multi-purpose stall barn for 300 horses



Equestrian Facility Options

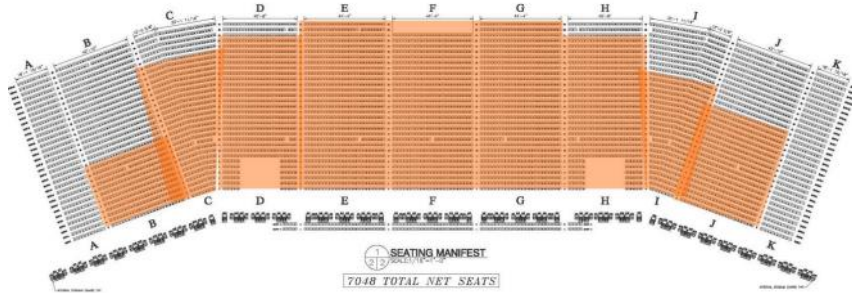
Option B

- Redevelop Back Side into a dedicated equestrian center
 - Add covered/open arena
 - Upgrades to viable existing stall barns
 - Dedicated trailer parking and RV sites

Grandstand Options

- Significantly renovate and rehabilitate existing grandstand
- Replace existing grandstand with a new grandstand (similar to North Dakota State Fair) with 2,500 to 3,000 seats

Grandstand Option



Grandstand Option



Four Seasons Arena Upgrades

- Four Season Arena Upgrades:
 - Accessible bleachers
 - Sound enhancements
 - Additional restrooms
 - Repaint structural steel
 - Reconfigure ice pit

Exhibition Hall Upgrades

- Exhibition Hall Upgrades:
 - Addition of liner panels
 - Addition of catering/commercial kitchen
 - Add moveable air walls for creating meeting rooms
 - Better access to restrooms

Alternative to Equestrian Arena

- Build a new 5,000 to 6,000 seat multi-use arena to the northeast of the Four Seasons Arena (with connector to Four Seasons), with dressing rooms, box office, concessions restrooms, foyer, concourse and public spaces
- Convert Four Seasons Arena into all trade show/exhibition space, removing bleacher seating, with air walls, catering kitchen, etc.

Alternative to Equestrian Arena

- Replace old horse barns (back side area) with new multi-purpose horse barn(s) accommodating 250 to 300 horses attached to new arena
- Add covered and open arena

Alternative to Equestrian Arena



Other Options

- Provide area in current infield of race track for RV rallies
- Attract hotel developer to locate across from the ExpoPark in the West Bank Renewal District

Preliminary Range of Costs

Montana ExpoPark Study

Preliminary Range of Costs

Equestrian Facilities - Option A

Description	Range of Costs	
New indoor arena with enclosed warm-up arena	9,000,000	9,400,000
Renovate Livestock Pavilion in stalling	<u>1,250,000</u>	<u>1,500,000</u>
Total	<u>\$10,250,000</u>	<u>\$10,900,000</u>

Equestrian Facilities - Option B

Description	Range of Costs	
Demolish barns and horse race service facilities	\$100,000	\$125,000
New indoor arena with enclosed warm-up arena	9,000,000	9,400,000
New 300-stall horse barn and outdoor arena	<u>3,500,000</u>	<u>3,850,000</u>
Total	<u>\$12,600,000</u>	<u>\$13,375,000</u>

Preliminary Range of Costs

Four Seasons Arena/Exhibition Hall - Option A

Description	Range of Costs	
Convert 4 Seasons to Exhibition Building	1,000,000	1,100,000
Convert Exhibit Hall into meeting/banquet space	<u>1,000,000</u>	<u>1,400,000</u>
Total	<u>\$2,000,000</u>	<u>\$2,500,000</u>

Four Seasons Arena/Exhibition Hall - Option A

Description	Range of Costs	
New 5,000 to 6,000 seat arena	28,000,000	33,000,000
Convert 4 Seasons to Exhibition Building	1,000,000	1,100,000
Convert Exhibit Hall into meeting/banquet space	1,000,000	1,400,000
New 300-stall horse barn and warm-up arena	<u>3,500,000</u>	<u>3,850,000</u>
Total	<u>\$33,500,000</u>	<u>\$39,350,000</u>

Next Steps

Montana ExpoPark Study

Next Steps in Study

- Refine options and construction costs
- Prepare financial projections of operating recommended facilities
- Assess funding options
- Prepare economic impact assessment for operating the recommend facilities